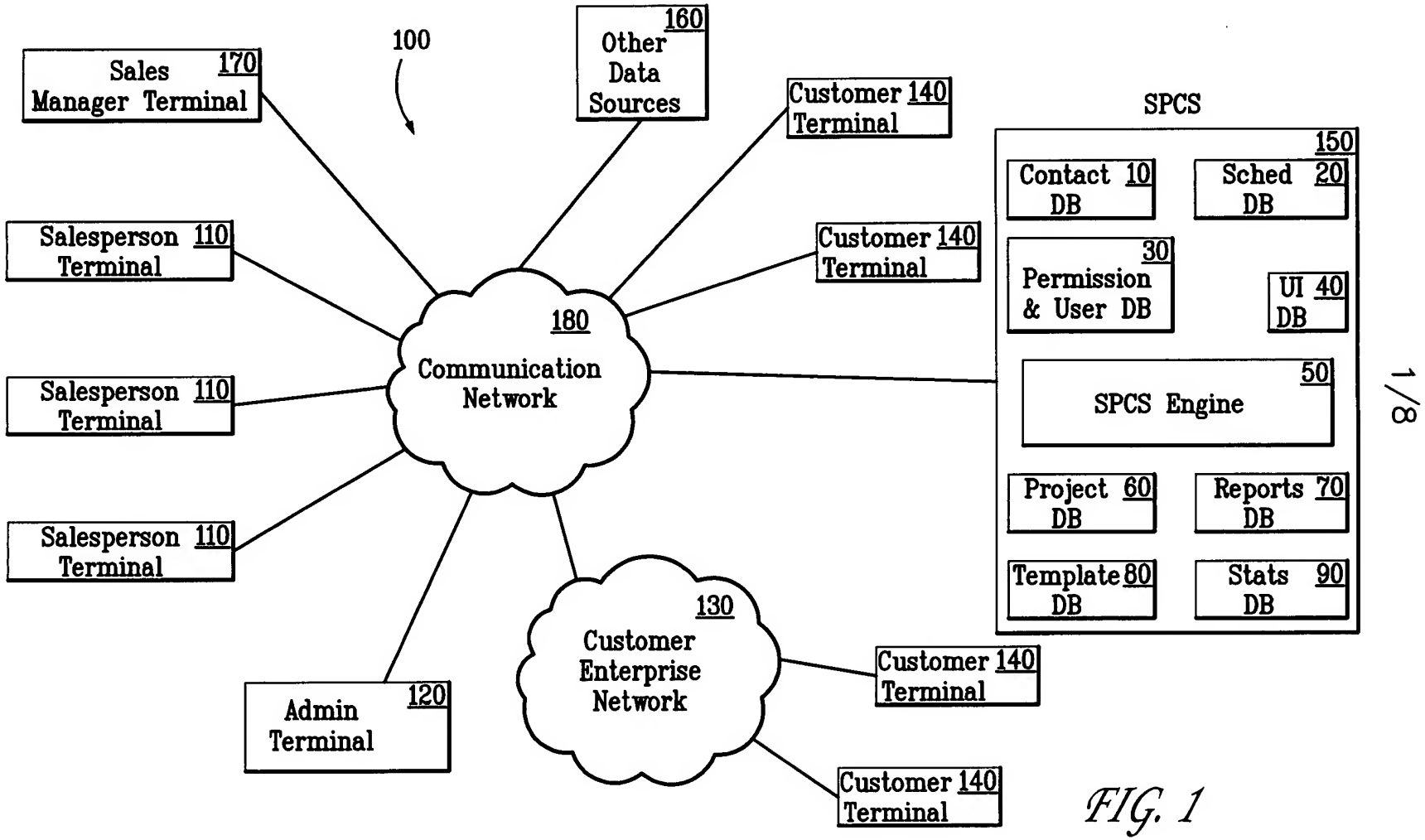
100
Sales Manager Terminal 170
Other Data Sources 160
Customer Terminal 140
SPCS
150
Contact DB 10
Sched DB 20
Permission & User DB 30
UI DB 40
SPCS Engine 50
Project DB 60
Reports DB 70
Template DB 80
Stats DB 90
Salesperson Terminal 110
Salesperson Terminal 110
Salesperson Terminal 110
Customer Terminal 140
180
Communication Network
Admin Terminal 120
130
Customer Enterprise Network
Customer Terminal 140
Customer Terminal 140

FIG. 1

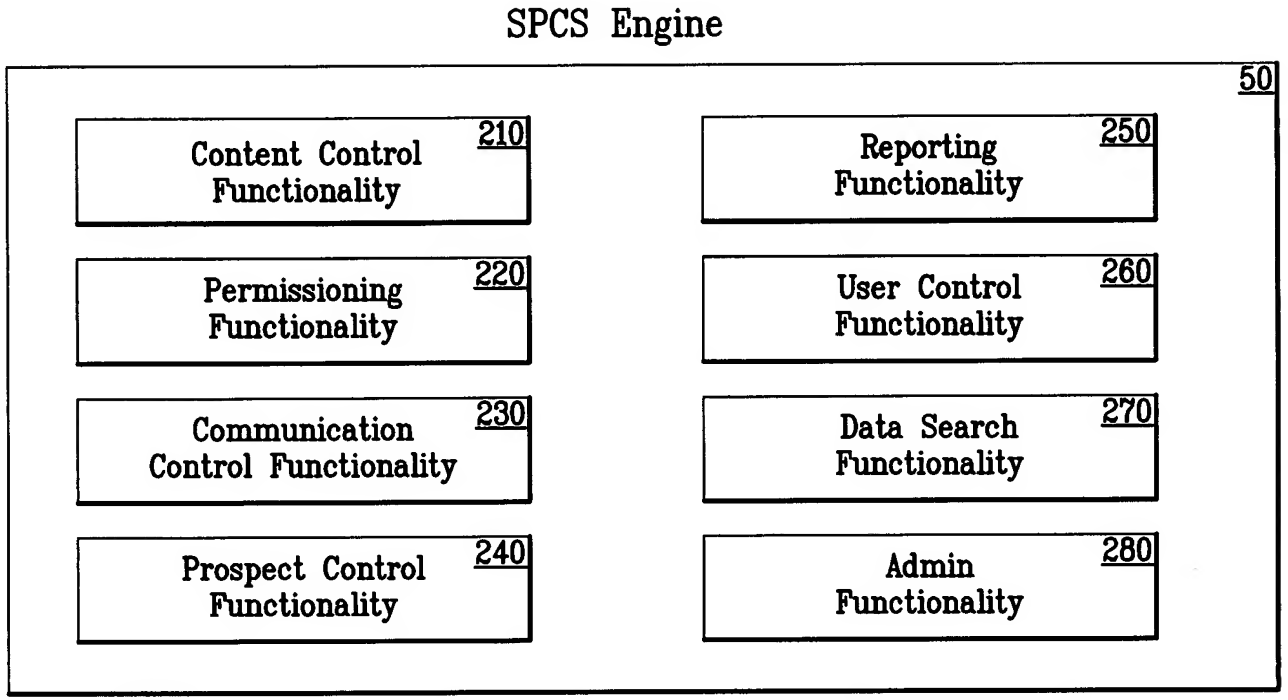
SPCS Engine
50
Content Control Functionality
210
Permissioning Functionality
220
Communication Control Functionality
230
Prospect Control Functionality
240
Reporting Functionality
250
User Control Functionality
260
Data Search Functionality
270
Admin Functionality
280

FIG. 2

System Administration: Create New UFollowUp Account

Complete the form below to update your account profile

Fields labeled in bold are required.

1 Create New Account

Submit information and click submit.

Company Name : GE

Contact Name: William Smith

Title: William Smith

Email Address 1: wsmith@homedeveloper.com

Address Line 1: 234 Street Way

Adress Line2: Suite 340

City: Tyson's Corner

State/Zip: VA 20191

Phone: 703-878-0909

Create their username and password:

Username: wsmith

Password: wsmith

Re-Type Password 23458789

SUBMIT

Update their logo:
With UfollowUp we take your costomized messages to the extreme level
Upload a photo here.

PHOTOS MUST BE 720PI AND 200 x 200 IN SIZE.

Log: GE BROWSE

Notes:

Fee Negotiated Per Community: $ 100.00

Photo Galleries Turn Galleries Off

FIG. 3

System Administration: Manage Your Roster

Complete the form below to update your employee roster. All changes will generate notification emails to the respective users email address provided below.

1 Update Your Roster

Add an employee or edit current listings by changing the populated information, and click submit. If you would like to add a new staff member fill in the information below and click add. If you would like to delete staff, simply click delete.

Add Employee to Roster - Click Add after filling in the employee information.

New Employee

Detail Information

Name: First M. Last

Email Address 1:

Address Line 1:

Address Line 2:

City:

State/Zip:

Phone:

Mobile Phone:

Fax:

ADD

Upload photo:
With UfollowUp we take your customized messages to the extreme level Upload a photo here.

PHOTOS MUST BE 720PI AND 200 x 200 IN SIZE.

Photo: GE Browse...

Permissions:

- Broadcasting
- Reporting
- Recent Activity
- Manage Templates
- Override Default Schedule
- Manage Schedules
- Edit A Community
- Add A community
- Manage Account
- Add/Edit Roster
- Download Data
- Manage Traffic
- Manage PhoneCall

FIG. 4

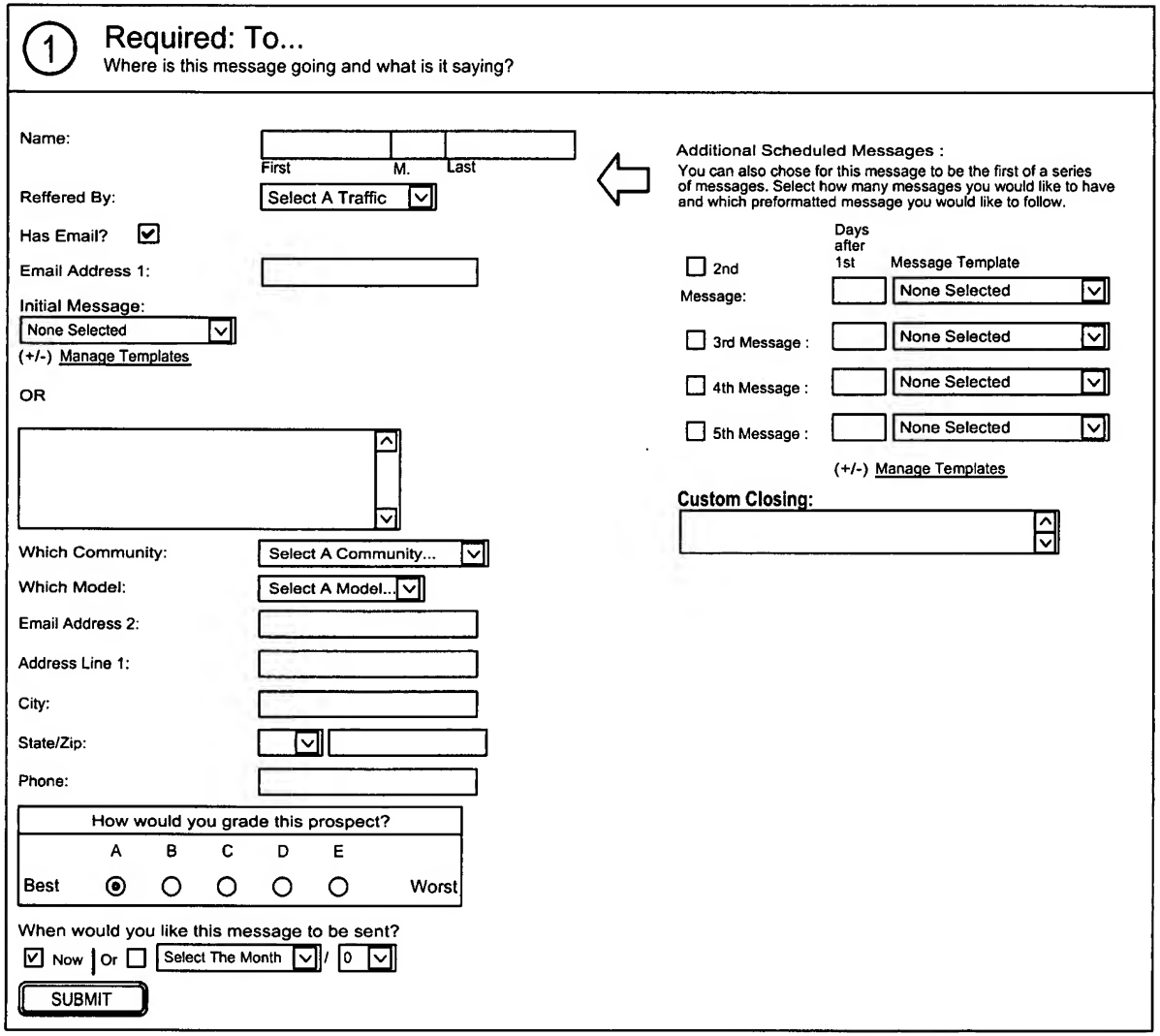
1
Required: To...
Where is this message going and what is it saying?
Name:
First
M.
Last
Reffered By:
Select A Traffic
Has Email?
Email Address 1:
Initial Message:
None Selected
(+/-) Manage Templates
OR
Which Community:
Select A Community...
Which Model:
Select A Model...
Email Address 2:
Address Line 1:
City:
State/Zip:
Phone:
How would you grade this prospect?
A B C D E
Best
Worst
When would you like this message to be sent?
Now
Or
Select The Month
/
0
SUBMIT
Additional Scheduled Messages :
You can also chose for this message to be the first of a series of messages. Select how many messages you would like to have and which preformatted message you would like to follow.
Days after 1st
Message Template
2nd Message:
None Selected
3rd Message :
None Selected
4th Message :
None Selected
5th Message :
None Selected
(+/-) Manage Templates
Custom Closing:

FIG. 5

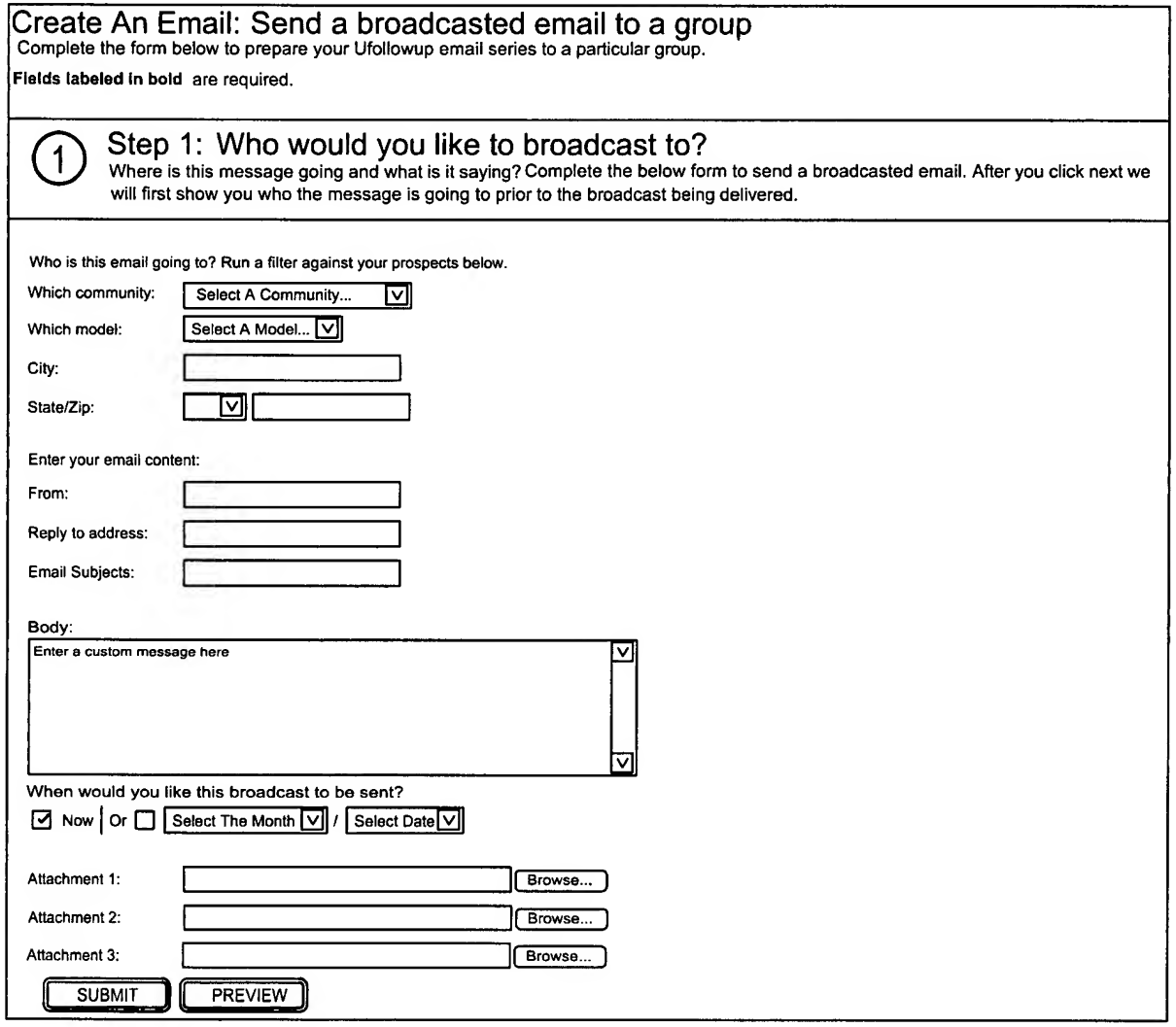
Create An Email: Send a broadcasted email to a group
Complete the form below to prepare your Ufollowup email series to a particular group.
Fields labeled in bold are required.
1
Step 1: Who would you like to broadcast to?
Where is this message going and what is it saying? Complete the below form to send a broadcasted email. After you click next we will first show you who the message is going to prior to the broadcast being delivered.
Who is this email going to? Run a filter against your prospects below.
Which community:
Select A Community...
Which model:
Select A Model...
City:
State/Zip:
Enter your email content:
From:
Reply to address:
Email Subjects:
Body:
Enter a custom message here
When would you like this broadcast to be sent?
Now
Or
Select The Month
/
Select Date
Attachment 1:
Browse...
Attachment 2:
Browse...
Attachment 3:
Browse...
SUBMIT
PREVIEW

FIG. 6

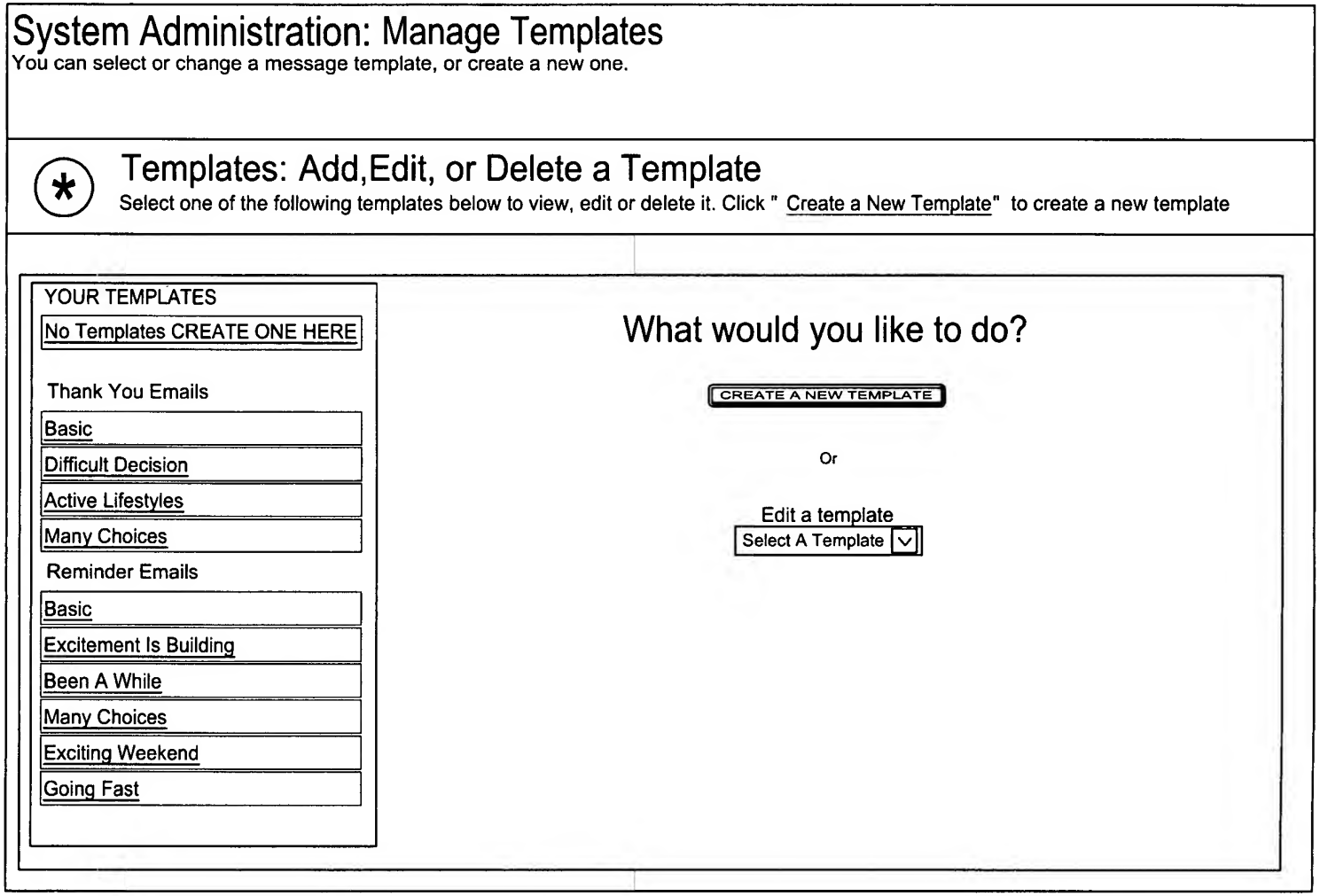
System Administration: Manage Templates
You can select or change a message template, or create a new one.
Templates: Add,Edit, or Delete a Template
Select one of the following templates below to view, edit or delete it. Click " Create a New Template" to create a new template
YOUR TEMPLATES
No Templates CREATE ONE HERE
Thank You Emails
Basic
Difficult Decision
Active Lifestyles
Many Choices
Reminder Emails
Basic
Excitement Is Building
Been A While
Many Choices
Exciting Weekend
Going Fast
What would you like to do?
CREATE A NEW TEMPLATE
Or
Edit a template
Select A Template

FIG. 7

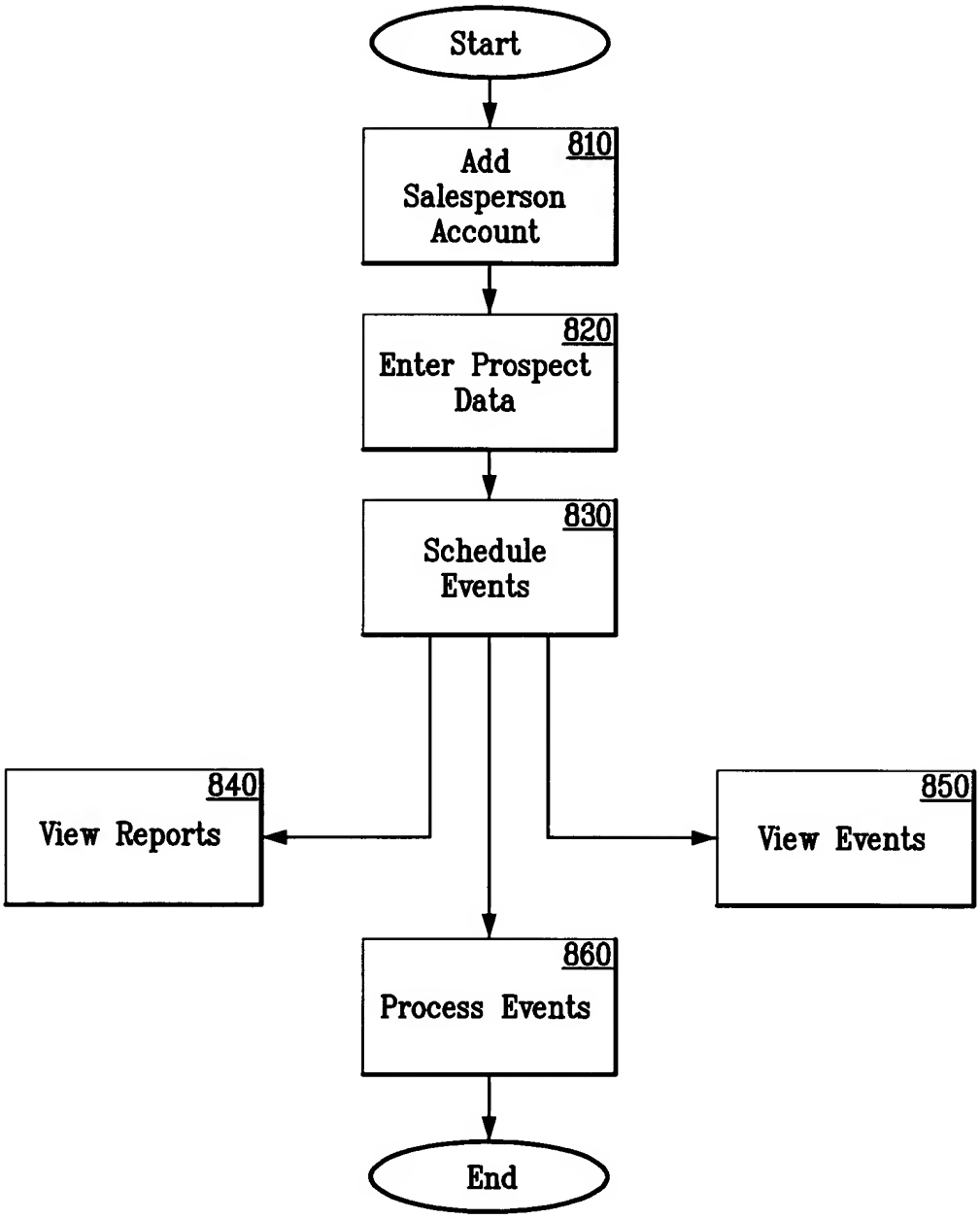
Start
810
Add Salesperson Account
820
Enter Prospect Data
830
Schedule Events
840
View Reports
850
View Events
860
Process Events
End

FIG. 8